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ABSTRACT

This paper reports on the history, rationale, procedures, and results of a 4-day meeting of 96 administrators, from two large school systems, who represented all levels of administration. The report sets forth participant attitudes toward specific parts of the 4-day event and indicates some of the outcomes of the meeting that were reflected in administrative practices during the ensuing school year. The paper concludes with a summary of participant reactions in terms of the dilemma between the necessity for (1) organizing any directing information to rationalize administrative functions and (2) obtaining and sharing complete and valid information critical to creative and innovative decisionmaking. (Author/MLF)

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THE ORGANIZATIONAL INVENTORY MEETING:

A METHOD OF GAINING AND INTEGRATING ADMINISTRATIVE COMMITMENT

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ABSTRACT

This paper reports on the history, rationale, procedures, and results of a 4-day meeting of some 96 administrators from 2 large school system, representing all levels of administration, down through and including the principals. This administrative unit is fairly new, having been created by the legally-mandated amalgamation of many smaller systems in January 1969.

The meeting described was part of a large-scale Organization Development (OD) effort by the first writer which had the general purpose of beginning and sustaining organizational renewal processes in the entire system. Organization Development is a planned, organization-wide effort that is managed from the top and designed to increase organizational effectiveness and health through planned interventions in the organization's "processes," using behavioral science knowledge (3).

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The Organizational Inventory Meeting (OIM) was designed and conducted by three Organization Development consultants employed by the system. The entire 4-day meeting was requested and planned by a committee of representatives of the Principals' Association and the central administration, with the active assistance of the Organization Development consultants. The meeting was observed by the two authors of this paper. The form of the meeting was largely that of the Confrontation Meeting (4) which has been used successfully with largely decentralized industries and businesses, but special adaptations were made to fit the school situation.

This paper presents both case observations and results of the Organizational Inventory Meeting, reported in terms of attitudes towards specific parts of the 4-day event and some outcomes of the meeting on administrative practices during the following school year. As well, it summarizes and integrates the reactions of participants in terms of the dilemma between (1) the necessity for organizing and directing information in order to "rationalize" administrative functions and (2) the necessity for obtaining and sharing complete and valid information critical to reaching decisions which demand creative and innovative solutions.

INTRODUCTION

Human resources are the most important asset of an organization, an asset that determines the usefulness of the physical resources and the ultimate value of the financial resources. Releasing the potential of an organization's human resources and then assisting <u>all</u> of that organization's resources (human,

physical, and financial) to become a more effective working whole is an urgent problem in this day of soaring costs and plunging budgets in school systems. The successful accomplishment of this liberation and drawing together of an organization's resources depends upon the complete and adequate of sharing of relevant information and upon effective problem-solving.

The narrative in this paper presents a brief description of the beginning of one large educational organization's attempt to implement these values and beliefs through the establishment of a 3-man Organization Development Unit to serve as internal consultants to the organization. The essential aims of the consultants are to help the organization develop its own potential, solve its own problems, and develop its own methods for managing change. One intervention into the ongoing social processes of the organization was the Organizational Inventory Meeting.

THE ORGANIZATIONAL INVENTORY MEETING:

Overview: A School Board Recognizes

On January 1st, 1969, 21 school boards in a 650 square-mile area north of the city of Toronto amalgamated to form the York County Board of Education. Similar school board reorganizations were effected simultaneously throughout the entire province as a result of an act of the Ontario government. The York County amalgamation brought together approximately 1,900 teachers, consultants, and supervisors, 90 principals, and 45 top administrators. But these bodies, welded together legally and administratively, were widely dispersed geographically and relatively unknown to one another.

For several months, the names of many of those who would fill the top administrative positions went undecided. Superintendents from former school districts were unsure whether they would remain in a top-level position or return to a principalship or teaching position. Confusion abounded on the business side of this greatly expanded and spread-out school system--distribution of supplies, storage of information, budgeting, and many similar operations produced massive headaches and tie-ups.

At the beginning of the new board's first full year of operation, September, 1969, an Organization Development Unit was formally born. The three staff members of this Unit were to report directly to the Director of Education but their offices were located several miles distant from the head office. They were trained and assisted by the

first author of this paper and two of his colleagues at The Ontario Institute for Studies in Education. The basic aims of the Organization Development staff members and their consultants were:

- to improve the operation and interpersonal functioning of all of the York County Board's working groups, within and among themselves;
- to work out ways of managing planned change; and
- to release and develop the resourcefulness and creativity of the members of the system.

During the succeeding year the OD team worked with the members of intact work units, such as Board committees, area office staff, the top management group, and school staffs. They attempted to help these teams function more efficiently, harmoniously, responsibly, and responsively. They encouraged individual team members to work with one another and with members of other teams in such a way that they could become less restricted in their thinking and more creative. They tried to help them to help themselves--to develop their own potential, to solve their own problems, and to work out their own methods for coping with and creating change without depending upon others to carry out these functions for them.

But the principals in the York County system remain an amorphous group, largely isolated from one another and from the top management group and still rocked by the confusions and tensions produced by the recent amalgamation. The principals of each of the four areas met with their superintendents once every 2 to 4 weeks. But the principals of the entire system had met on only two or three occasions and then only to discuss cursorily certain key issues and to have ideas and directives fed into

them by the top administrative staff (such as how to handle a formula for the teacher-pupil ratio). No feeling of county-wide administrative cohesion had thus been achieved by the time the 1969-70 school year came to a close.

However, in May of 1970, the principals of two of the areas simultaneously yet separately agreed that a conference for and by all county principals might be of value in achieving some degree of cohesion and increased work effectiveness. An ad hoc, county-wide planning committee was established. Rapidly its members enlarged the scope of their proposed conference to include the top management group so that an increase in cohesion among the total administrative staff of the county might be facilitated. The Administrative Council of the Board gave tentative approval to the conference and suggested that the OD Unit be involved in the planning. Earlier in the year, the OD team members and the Director of Education had discussed the desirability and possibility of holding a confrontation meeting for the county's administrative staff. When the conference plans were finalized, such a meeting became a reality.

Applying the Confrontation Meeting to a Reorganized School Board

In 1967 Richard Beckhard, an organizational development specialist, devised what he termed a Confrontation Meeting (4). This meeting provided an opportunity for the total management group of an organization, drawn from all of its levels, "to take a quick reading of its own health, and--within a matter of hours--to set action plans for improving it." As it is typically

used, the Confrontation Meeting lasts only one day and consists of two parts--information-collecting and goal-setting, with a follow-up meeting scheduled for a later date. In Figure 1 (see Appendix A), you can find a representative outline, in flow-chart form, of the general procedures for a Confrontation Goal-Setting Meeting. Beckhard claims that such a meeting is appropriate where:

- there is a need for the total management group to examine its own workings but very little time is available for such an analysis;
- there is a real commitment to resolving issues--and with speed---on the part of top management;
- there is enough cohesion in the top management team to ensure follow-up; and
- the organization is experiencing, or has recently experienced, some major change.

However, as the OD Unit worked with the York County conference planners, needs and thus objectives beyond those listed above came to the surface. For example:

- the need for the principals and other administrators to become better acquainted with their widely dispersed colleagues and to grow in their trust and acceptance of one another;
- the need for the principals to hear and experience new ideas;
- the need for the principals to see themselves as part of a county-wide team in which they could be interdependent while retaining their individuality;
- the need for the principals to see more clearly their decision-making function within the system;
- the need for the principals to become more confident about initiating ideas and plans, making decisions and assuming responsibility for them, while remaining accountable to those above and below them; yet at the same time
- the need for the principals to be reassured in their role.

Since the emergent aims of this conference were broader in scope than those normally identified with a Confrontation Meeting, the design of the workshop that developed went beyond that of a Confrontation Meeting and included other information-gathering and communication aspects which were important to both the individual participants and the organization as a whole. The title, "Organizational Inventory Meeting" or OIM, was applied to this expanded version of a Confrontation Meeting.

A total of 97 administrators and one trustee met from August 23-27, 1970 at Geneva Park (the YMCA Center for Leadership Development and Training), located on the shores of Lake Couchiching, some 100 miles north of Metropolitan Toronto.

Beginning the OIM: The Director Establishes the Climate

Sunday afternoon the Organizational Inventory Meeting opened abruptly and startlingly. The Director of Education set what he and the conference planners hoped would be the climate for the entire meeting by risking to speak openly and bluntly about the problems facing the York County system.

- He stated that the members of the York County Board had to accept the fact that they belonged to a new board--the old board had disappeared forever--and that they must start cooperating in order to go forward; they could no longer sit in isolation, look backward, and regret the loss of the old days.

- He cited issues of noncooperation in the difficult, confusing year-and-a-half that had just passed and named culprit schools; he reminded his listeners of their reaction to the central administration's foul-up in the distribution of supplies the year previous--how some principals had cooperated with one another by sharing supplies while others had simply sat back, yelled, and enjoyed themselves.

- He admitted the great gap that existed between himself, along with his top administrative staff, and the principals; he expressed his desire that one outcome of the conference would be the closing of that gap.

- He opened up about himself, saying that while many saw him as brusque and strong, in fact he was shy and easily hurt. "When you hurt me, I may react irrationally and strongly, but I do recover and get a grip on the situation. I bend easily but I don't break."

The Director opened himself up to his subordinates in order to model how he hoped they would act during and after this workshop--trustfully interchanging ideas and feelings, and openly and honestly stating problems, risky though that might appear. He expressed the hope that the problems that would be bared in this meeting could be solved cooperatively by all those attending. He recognized that arbitrary decision-making at the top would foster no growth in responsible and creative leadership, self-esteem, cohesion, or goodwill within the system as a whole.

Few of those attending realized at the time the tremendous risk the Director had taken in speaking as he did. But at the conclusion of his three-quarter of an hour speech, a stunned silence was finally shattered by a great round of applause.

Collecting Information on the System's State of Health: Identifying Problems and Desirable Changes

The latter half of the first afternoon's session centered upon collecting information of two sorts: (a) the obstacles the participants perceived as blocking effective performance of their role, and (b) the altered conditions they viewed as necessary for overcoming these obstacles.

The participants were instructed to break down into heterogeneous, non-work groups of approximately 7-8 persons. People from different geographical areas throughout the county system and at different educational levels (e.g., elementary, secondary) were to mix; no subordinate was to be in a group with his superior. Unfortunately, the composition of the groups that formed was not carefully monitored and the OD members did not discover until the end of the information collection session that the participants had clustered into their work cliques. And rather than 15 groups of 8 people, 8 groups of from 4-20 people had formed. A lesson learned!

During this one-hour session, the members of each group (housed in separate rooms) were to record on 2x3' sheets of paper a list of the obstacles or demotivators in the system--the procedures, policies, goals, attitudes, etcetera--that they felt were preventing them from doing as good a job as they should be able to do. They were then to list whatever conditions they felt could make the organization more effective and improve life in the system.

During the dinner hour, the "big sheets" from each group were collected and one member from each group worked with the OD team members to categorize the responses listed by the various groups. Great difficulty was encountered in categorizing the obstacles to effective functioning. The participants had not yet settled into their work routine of the meeting and their trust level--and thus their feeling of freedom to be honest--was low. Consequently, they defined obstacles in terms devoid of specifics, terms too broad to permit adequate and useful categorization.

However, categorizing the conditions for improvement proved a much simpler task. It appeared to be much easier for everyone to be specific about what <u>should</u> be than to risk stating honestly and precisely what they felt was wrong within the system.

Sunday evening all the participants were given ditto sheets of the lists of obstacles and conditions for improvement. The intent had been for the participants then to separate into their natural work groups in order to start dealing with the problems relevant to their position and duties--budgeting, revamping the secondary school curricula, and so forth. But, since categorization of the obstacles had proven impossible, the participants separated instead into five groups, representing the four areas and the top Administrative Council.

The task of each group was:

- to identify as precisely and concisely as possible the problems facing the county;
- to decide upon the ownership of the various problems-- "this problem should be handled by the Administrative Council, this by our area, this by another area, this by the business office, etcetera"; and
- to rank the problems in order of their importance.

These three lists of problems, responsibilities, and priorities were again recorded on the big 2x3' sheets of paper.

At this point it should be noted that at the close of each group session, each member of a group, while still within his group, was expected to fill out a team-rating scale (see Appendix C). The individuals were to rate their own and their group's functioning for a particular session

in terms of:

- group effectiveness
- explicitness of group goals
- success in dealing with the here and now rather than the there and then
- personal freedom to level
- personal effectiveness in assisting the group
- satisfaction of personal expectations
- degree of group acceptance of personal contributions
- percentage of time spent by group in dealing with content, methodology, and process
- atmosphere of session (e.g., productive, rewarding, opinionated, ineffective, competitive, evasive, work, fight, flight, tense)
- personal development and application of task skills
  (in finding common goal
  confronting issues
  seeking data
  identifying alternatives
  linking conflicting ideas
  evaluating
  dominating
  testing reality
  keeping group on goals
  initiating)
- personal development and application of maintenance skills
  (in gate keeping
  giving support
  analyzing process
  listening
  providing information
  clarifying
  following
  providing method
  blocking
  risking constructively)

After each individual had filled in his group rating scale, he was to share and discuss his perceptions with the other members of his group.

Attacking the Problems

On Monday morning, the participants met together in the auditorium. One spokesman from each group reported upon his group's enumeration of the serious problems facing the system and of their decision as to whom the problems belonged. Each group then retained a copy of the list of problems which they had claimed as their own and distributed copies of the other lists of problems to the groups they felt could best handle them.

The five groups then met in separate sections of the auditorium in order to start working out solutions to the assigned problems they deemed to have highest priority. Each problem was handled by a sub-group comprising those most closely connected to the problem. The members of these subgroups were expected to devise a plan of remedial action which they were to execute upon returning to the system in the fall. In order to obtain a commitment from the participants, the OD team requested the groups to record their action plans on paper and hand in their proposals on the last morning of the workshop.

These sessions to date had had a purpose over and above that of identifying and solving problems within the system. They were also designed to facilitate team-building. The OD team members concluded in retrospect that the team-building should have been dissociated from the problem-solving for the latter to be effective. They believed that if the participants had been given the opportunity to build up a history of work experience centering on a safer, less important topic, they could then have dealt more productively with the obstacles in the system and

the conditions necessary for improving the work situation.

Improving Interpersonal Communication: Developing Process and Feedback Skills

The basic objectives of the Confrontation Meeting having now been worked on, Monday afternoon saw a deviation from the direct focus on the problems facing the system. Instead, through a procedure known as clustering or fishbowling, the participants were given an opportunity to develop skills in effective, task-oriented communication and feedback, as well as to see themselves in action and to release some of the frustrations that had been building up. A diagrammatic representation of the procedure can be seen in Figure 2 (see Appendix A).

In the first half of the afternoon, 12 groups of 8 people were formed. Each group was represented by members of the four geographical areas and the head office and by both elementary and secondary school principals. Clusters comprising two of these groups met in separate areas of the auditorium.

In each cluster, one group of eight (Group A) formed an inner circle, the members facing one another, while the second group (Group B) formed an outer circle, facing in on the inner circle of Group A. For 20 minutes, (precisely timed), Group A discussed the question: "How well have the groups I have been in been functioning with respect to content, process, and methodology?" (i.e., to the topic, to the reactions which were occurring, and to the procedures the group used to reach its decisions).

For those 20 minutes, Group B was allowed only to observe the process going on in the center; they were not permitted to speak. Then the two groups exchanged seats, Group B forming the inner circle. For 10 minutes, Group B commented on the process they had observed in Group A, backing up each general observation with specific examples. Group A was allowed no time for a defense.

Group B, still in the center, then was given 20 minutes to discuss a second question: "How well have I been functioning in the groups I have been in?" At the end of these 20 minutes, Group A, who had become the outside observers, moved back into the inner circle and commented upon the process they had seen going on within Group B as they had discussed the second question. As with Group A earlier, Group B was permitted no time to defend their actions.

Now, all of the clustering had been carried out in one big auditorium. But the noise level throughout had been extremely low, the concentration and ernestness extremely high. Group members huddled in to hear what their colleagues were saying. When "stop" was called at the end of the second feedback session, an explosion shattered the silence. Everyone started talking loudly and furiously. A tremendous release from the frustration that had built up to dat was witnessed. The success of this first half of the afternoon was clearly evident from the immediate personal reaction of the participants and from the ratings on the evaluation sheets at the close of the meeting (see Appendix B).

After a brief break, the participants returned for a continuation of the fishbowling exercise. New groups and clusters were formed. Each group now consisted of 6 members, making up a total of 8 clusters of 12 people (6 in Group A and 6 in Group B).

For 10 minutes, Group A, in the inner circle, discussed a third question: "What were my reasons for coming to this conference; what did I expect to gain from this conference; and what am I doing to achieve my personal expectations?" This question evoked great laughter from the participants. To them, this workshop had been a command performance; they had felt compelled to attend because the top administrative staff were going to be present. And this meant the loss of one week of their precious summer holidays. The annoyance, frustration, and resistances of the participants had been very evident on Sunday. They had huddled in little groups in the corridors with their coffee cups in hand, complaining about having to be at the workshop, not knowing what to expect or really why they were here, doubting if they would gain anything from their "lost week." But, from evaluations gathered later, Monday afternoon seems to have been a turning point towards greater trust, openness, and interpersonal commitment.

After Group A's 10 minute discussion, Group B then moved into the center circle and for 5 minutes offered their observations on Group A's handling of this question. Then for 10 minutes Group B discussed the fourth and final question: "What are our expectations regarding changes within the organization as a result of this workshop?" Finally, Group A, again back in the inner circle, concluded the fishbowling with their 5-minute commentary on Group B's handling of the last question.

Unfortunately, the second half of the clustering exercise proved less effective than the first because the shortened time segments of 10 and 15 minutes respectively did not provide sufficient time for good discussion.

Planning for Living: Self-Assessment and Goal-Setting

Monday evening the participants broke themselves down into groups of three. The trios found a meeting place of their own choosing and proceeded to fill out individually a career plan, developed by Herbert Shepard and entitled "Planning for Living" (8).

First, each person prepared a "Life Inventory" by writing answers to such questions as:

- What do I do well?
- What do I dislike doing that I must do in my job or outside?
- What do I want or need to do better?
- What dreams or wishes do I have that I have not turned into plans?

Then each person developed a "Career Inventory" by answering such questions as:

- What kinds of work experiences give me the greatest satisfaction?
- Which of my skills and talents are most highly valued by my organization?
- What are the flat sides of my work environment in terms of leadership, administrative and interpersonal competence?
- What do I dislike in my present job situation?
- What rewards mean the most to me--status, money, power, recognition, achievement, security, sense of growth, sense of challenge, risk-taking, close relations with many people, doing my own thing, etcetera?

- What new skills do I want to develop?
- What new career opportunities would I like to explore?

Finally, each person brought the work into focus by formulating definitively in writing goals he now wished to achieve, steps which must be taken to reach these goals, and target dates for the completion of the various steps (6).

After completing the form, the members of the trios shared their personal relevations, hopes, and plans. The purpose of having the participants work in trios and engage in sharing was to attempt to build small, cohesive groups of people who had opened up to one another on crucial, personal issues. Hopefully, in the months following this workshop, the members of these trios would feel free enough to call upon one another for support in times of crisis.

The lesson learned by the OD team members from this exercise was that the career planning's potential effectiveness was greatly reduced when the plan was handed out as a whole at the beginning rather than one step at a time. The result of handling it out as a whole was that many people "finished" their career planning (for ten years to come!) in 20 minutes flat while others were still deeply engrossed 1 ½ hours later.

Identifying the Characteristics of a Good Job

The program on Tuesday morning and afternoon was directed by Dr. Frank Jasinski, a cultural anthropologist and organization development specialist formerly associated with TRW Systems, a space research company with headquarters in California. Dr. Jasinski spoke briefly and intermittently

throughout the day on the concept of organization development. However, the data he used to illustrate his points and to further the participants' examination of their system's problems were generated by the participants themselves in a series of exercises.

Early in the morning session, he requested that the participants, who were seated in the auditorium, shift their chairs around to form groups of 6-8 people. In these groups, they drew up a list of conditions which existed in the best job any of them had ever held. Then, after everyone had reunited into a single group, one spokesman from each group read out the conditions his group had listed. Dr. Jasinski then consolidated on a blackboard all of the conditions into one single list. He commented that this final list was almost identical with lists he had elicited from many other groups on previous occasions.

After a coffee break, the participants again formed into their subgroups to draw up a new list of the good working conditions that they had previously experienced which they wished could be initiated or enhanced in their present work situation. A general discussion and elaboration of these "good conditions" ensued in the total group.

"Seeing Ourselves as Others See Us"

Tuesday afternoon the participants worked through an exercise called the "bug list," designed to help them see themselves as others saw them in their actual work roles. They were asked to assign themselves voluntarily to one of nine groups representing important role groups within the system:

- Principals
- students
- parents
- teachers
- master teachers
- trustees
- psychological and guidance service staff
- central administration
- purchasing-business office staff.

They did not have to enter a role group to which they belonged in the actual work world--for example, a principal could join the group designated as "parents" or a guidance specialist could become part of the "student" group.

In these nine groups, the participants drew up a list of the things principals did to bug them. The "bugs" were recorded on the by-now-familiar 2x3' sheets of paper. After each group had completed its task, everyone reunited into one large group and sat in semi-circle rows facing the back wall of the auditorium. A spokesman for each group tacked his "bug lists" up on the back wall and then joined his fellow spokesmen who were sitting at the back where they could view the lists while still being seen by the other participants. One by one the spokesmen rose to challenge the principals with their groups' complaints. "I am a member of the psychological and guidance service staff and I cannot tolerate principals who interfere with the performance of my job by doing this or that to me." Since most of the participants were in reality principals, they were forced to role play. Some superbly. An empty chair had been placed in the area where the spokesmen were

sitting. Anyone from the audience wishing to express an opinion or defense had the freedom to sit in that chair and talk.

While most of the spokesmen proved quite skillful in their roleplaying, the roleplaying for some of the group participants proved virtually impossible. For example, in the group of eight representing the psychological and guidance service staff, two of the principals continually bristled as aggravating actions and attitudes of principals were cited. They would leap to defend themselves as principals, saying, "but of course, we must do this or be like that because.....and so on and so on; our job simply does not allow us to act any differently." A most interesting observation was that the principals who formed the principals' group felt that they had been unable to be as productive as their colleagues in other groups because they were "playing" themselves.

At the end of the afternoon session, Dr. Jasinski concluded by saying "You, as principals, have been fantastically accurate in recognizing what you are doing to bug the members of these various groups. Now what are you going to do about it?!"

The Top Administrative Council Meets in the Round

The climax of the 4-day workshop was reached on Wednesday. This day had been turned over to the Director and his executive committee to do with as they pleased. However, by Monday evening, they had abandoned their original plans and enlisted the assistance of the OD Unit and Dr. Jasinski in designing a program which would fit into and enhance the entire Organizational Inventory Meeting.

The Director began on Wednesday morning by explaining his reasons for extending the OIM rather than carrying out his original plans for the day. He then requested that the participants break down into their four area groups and recheck for accuracy their lists of problems assigned top priority and needing to be handled by the top administrative group. Each group's lists were consolidated into one concise list consisting of three major problems.

The Director and his Administrative Council then held a formal meeting in the presence of all participants in order to deal with these top-priority issues. The Administrative Council sat in the center of the auditorium around two tables, with the Director at the head; all other workshop participants sat facing in on them. Budgeting was the first issue to be discussed and the item to which most time was devoted. Half way through the morning's session, the members of the four area groups reconvened to reassess the relevancy of the topics under consideration and to comment upon the effectiveness with which the problems were being dealt.

One Administrative Council member had feared that this meeting might become more of a press conference than a genuine Council meeting dealing with problems generated on the spot by the principals. His fear that this experience could be unreal and thus detrimental proved to be ungrounded as evidenced by the immediate reactions of the onlookers and their responses on the evaluation forms (see Appendix B, item 6). It appeared that the Administrative Council, even under close scrutiny by the remainder of the administrators, conducted their meeting just as if they had been ensconced in their usual meeting place in the Board's head office.

The topic of supervision had originally been selected to be dealt with that morning via lecture and discussion. But the numerous exchanges of views which occurred between members of the Council as to their role and the role of the principal far more dynamically revealed attitudes towards supervision inherent in the system than would have been possible by any combination of lecture and discussion.

Demonstrating Problem-Solving with the OD Unit Consultants

Wednesday afternoon the Director and members of the OD team held a planning and problem-solving session on the stage of the auditorium, again in full view of all participants. The purpose of this session was to model for the administrators how the Director made use of the consultative services of the OD team. The performance of one segment of the system's personnel--none of its members represented at the meeting--was deeply troubling the Director. After he had detailed his concern, the OD members began to help him to work out in flow-chart form a procedure for dealing with the problem.

It was at this point that one of the OD members noticed the restlessness of the audience. During a brief break that ensued, one of the principals spontaneously brought forward a signed "testimonial" as to the effectiveness of the group being criticized. This proved to be the stimulus for changing the course of the session. The principals and other administrators engaged in a dialogue with the Director to enable him to collect real, on-the-spot data about the performance of the group under attack and thus to set his concern in perspective based on other perceptions.

Curiously, this was the only session in the entire workshop that produced a strongly negative reaction (see Appendix B, item 7). Seventeen percent of the participants actually felt that the exercise was detrimental and 31 percent declaimed that it had any value at all. Seeing a problem differently than the Director and dealing with that difference openly and directly was indeed uncomfortable for most of the participants.

Confronting the Administrative Council

The final session that afternoon brought the Director and his Administrative Council on stage to field questions fired at them from the floor by the principals. The Director qualified his open invitation to questions by saying that he would not answer any questions that he felt unprepared to deal with at the moment. While 96 percent of the participants felt that this session was of considerable worth (see Appendix B, item 8), the OD team members questioned its value because of the low-key nature of the questions, the gulf between the questioners and the respondents owing to the physical staging, and the relative uninvolvement of the members of the Administrative Council. In any event, it did seem to dampen the tensions of the previous session.

Closing the Meeting

The closing session, held on Thursday morning, began with a brief 5-minute reunion of the trios which had been formed Monday evening for the career planning exercise. Then groups comprising two trios apiece met to share their learnings from the 4-day workshop. Finally, all participants were

requested to fill out an evaluation form (see Appendix B). The responses to one question--as to the value of holding a quarterly meeting similar in purpose and design to the workshop--were immediately tallied. The participants strongly favored this suggestion (8:1 in favor) and selected October 15th for the first of these meetings. The conference then ended.

Follow-up

At the time of the writing of this paper (March, 1971) two follow-up meetings have been held with the system's administrative staff (principals and top Administrative Council) and changes in the functioning of these administrators are beginning to appear.

First Follow-up Meeting

The design of the first follow-up meeting, held in October, 1970, was developed collaboratively by the OD consultants and the Director. The program combined didactic input, group activities and dialogue between the total community and the speaker (who was generally the Director).

The first agenda item focused on input and accountability in the system. The Director presented his views on accountability. The participants separated into groups to discuss the Director's input with respect to their own views. A spokesman from each group reported back to the total community his group's perceptions of the issue. And the Director responded to specific items.

The participants, in groups, then proceeded to consider possible mechanisms by which principals could participate in the formulation of Board policy.

The mechanisms suggested by the various groups were presented to the Administrative Council and used in turn by that body to define a specific procedure by which principals could feed in their views and reactions during policy formulation.

These were two very important and complex issues with which the participants were grappling. The result was that these issues monopolized the entire eight hours of the meeting and none of the other agenda items could be dealt with. The outcomes of this meeting were fatigue, produced by the intensity and strain of activity, and frustration, resulting from the small amount of ground covered.

Second Follow-up Meeting

The difficulties encountered in the first follow-up meeting led the organizer of the February meeting, the Director, to fall back on a more typical agenda of straight presentation and discussion. This format did not maximize input and minimize exchange as expected. Apparently the Organizational Inventory Meeting had begun to take root.

By this meeting, much more meaningful confrontation than ever before became evident--between the Director and the principals, between the superintendents and the principals, and among the principals themselves. A principal finally risked publicly expressing a dissenting view. The result: others gathered up their courage to dissent. Another principal risked calling the meeting back to order as it was disbanding in order to clarify a concern. The Director now appeared to be growing more capable of soliciting and receiving critical feedback--and using it constructively. At this February meeting,

he publicly corrected himself and changed his stand on a certain issue.

At the same time, the Director and his associate began to recognize that the structuring of meetings must change and become more flexible if really productive work were to be accomplished. They recognized the need for breaks throughout the meeting and for a reduction in the number of items to be covered in any one meeting. When the hour specified for closing arrived, the Director ended the meeting even though not all the agenda items had been covered. Several principals continued to work for a short time longer, but most felt free enough to leave if they so desired. One lesson learned by the Director and his associate was that considerably greater dissension and critcism arose over agenda items about which the principals had not been consulted in advance.

Many of the principals indicated that the February meeting was much more fruitful and satisfying than previous meetings. One observer from the OD Unit remarked on the improved quality of this meeting and on the increasing skill displayed by various members in confronting issues, and identifying and solving problems.

Another useful outcome emerged from the initial meeting and developed throughout the year. The secretary of the Associate Director attended and assisted in the initial August meeting. There she became better known and trusted by the principals. Consequently, questions which previously had been directed specifically at the Associate Director instead came to her. Competencies were being recognized and utilized. Information began to flow more efficiently from the system to her and

from her back to the system. This outcome has been noted and accepted by all concerned: the principals, the secretary, and the Associate Director himself.

SUMMARY

The 4-day meeting described in this paper was an Organization Development intervention. It was a planned activity in which the consultants entered into "an ongoing system or relationships, to come between or among persons, groups, or objects for the purpose of helping them" (1). It was proposed and designed in response to needs expressed by several different clients within the organization. And it encompassed the broad perspectives of OD technology as outlined by Miles (9):

1. Self-Study: Clients introspectively study their functions related to group and organizational activities.

2. Relational Emphasis: Members of the organization scrutinize the ways in which their respective groups connect with others within and outside the organization so as to describe, assess, and improve the resultant intergroup networks.

3. Increased Data Flow: Communication paths in all directions (lateral, vertical, diagonal) are identified. Clarifying communication links may be facilitated by intensive residential workshops, especially those employing sensitivity-training techniques.

4. Norms as a Change Target: When norms characterized by information control are altered to norms characterized by openness, the net effect may be a strong motivation toward changing interaction patterns within the ongoing organizational operations.

5. Temporary-System Approach: Residential meetings remove the constraints imposed within "on-the-job" or "business-as-usual" situations.

6. Expert Facilitation: The use of consultants from outside the organization tends to facilitate the attainment of healthy interpersonal interactions during intensive residential experiences.

Organization Development, through a process of planned change, aims ultimately at creating a self-renewing organization. The culture of an organization consists of a set of widely, though often informally, held assumptions about norms, standards, and rules which regulate the behavior of its members. Organization Development involves redirecting the organization's culture towards (rather than away from) legitimizing and institutionalizing the examination of its social processes, including decision making, planning, and communication. It involves assisting a culture to accept and create necessary change rather than to blindly resist it. It assists the culture to develop and employ procedures for assessing needed changes; to determine the form these changes should, at least temporarily, take; and to adapt to these changes.

The Organizational Inventory Meeting, like all types of OD interventions, had two basic phases: diagnosis and planned intervention. In the diagnostic phase of an OD intervention, data are gathered about critical social processes within the organization. For the OIM described here, this phase began with interviews of the organization's leaders even before the first meeting of the conference planning committee. And this phase continued not only during the planning of the workshop but also during the workshop itself. While diagnosis can be separated conceptually from intervention, it is in reality often an inextricable part of the intervention, particularly if all members of the client group have not been available as a unit before the intervention. Even as individuals, the members of a client group may have little time available for extended data-gathering interviews, especially if they are the top decision-makers in the organization. (And individual perceptions may be inadequate or distorted). Consequently, much

diagnostic data-gathering must take place at the same time as the actual intervention itself, and so the diagnosis becomes an intervention in its own right. The distinction then between diagnosis and intervention is quite academic.

The practical problem in this OIM (a problem critical to effective organizational functioning) was to facilitate the cooperative and planned management of changes which were and would be occurring within the organization. The decision-makers and all others in the system possessing relevant information had to be assisted to share this information more fully and more adequately. Frequently the OD team and the participants had to set aside pre-determined objectives for a specific meeting and even sidestep pressing and complex organizational objectives in order to examine carefully what was occurring among the participants and between the various groups represented at the workshop. In effect, the participants, while engaged in very relevant organizational issues and while doing some very important problem-solving <u>for</u> the organization (including each other), found it necessary to take a careful look at what they were doing <u>to</u> the organization (and each other). Few, if any, of the participants came to disagree that "an ounce of analysis is worth a pound of objectives."

The developing commitment to the necessity of examining organizational processes and interpersonal problems arising from and within the OIM represented a shift in widely-held norms for the behavior of individuals within the organization. The brief accounts of the follow-up meetings illustrate the difficulty in sustaining such altered norms. In fact, were it not for data on outcomes from other interventions by the OD Unit (5,7)

which suggest shifts toward more effective teamwork and collaboration (such as reduced textbook expenditures as a result of more effective sharing of relevant information), it would be questionable whether this shift in norms was sustained at all.

IMPLICATIONS

The trend towards larger administrative units in education and the increasing emphasis upon sophisticated management and planning systems in school organizations highlight the necessity for a more adequate and complete use of the enormous quantities of information available within an organization by the many administrative personnel to whom that information is directly relevant. No longer can the large school administrative unit be a one-man show. Administrators in such large units continually face the dilemma of just how much information to receive, how much to make use of, and how much to take responsibility for. The difficulty and the usual solution have been well put by Thompson (11):

> " There is no real trick to establishing an organization without problems. One needs only to let it be known that no problems will be tolerated, and none will occur-- at least none that become evident. With the slightest encouragement, subordinate levels of supervision can act as effective insulators between the manager and the problems. "

The case study in this paper rather clearly demonstrates that the intent to share all information and to maximally involve all relevant personnel in working through an organizational problem is not enough. Information within the total administrative team will necessarily be distributed unequally. When this information is in the mind of one or only a few persons, it tends to create conditions such as those

experienced by many of the participants at the beginning of and during the OIM, conditions which were in effect a continuing but surreptitious agenda of the meeting.

For example, participants felt a reduction of the psychological space of free movement, (i.e., a constriction of the behavioral options available to them). Some did not feel that attendance at the meeting was optional even though this was emphatically stated before the meeting. The difficulty for any who did not attend would be their lack of information and of strong relationships with other administrative personnel with whom they would have to interact in the coming year. During the meeting, as the subtle and previously little discussed organizational problems, along with possible solutions, were made explicit, their ownership came increasingly under the control of a specific subgroup of the total administrative team, thus hemming-in and strictly delineating the proper boundaries of information control. This constriction of the area of psychological free movement encourages feelings of lack of choice, and of pressure. It can lead to a condition of psychological failure when it reaches the all-too-common stage where someone else defines an individual's or a group's goals, the path to these goals, the level of aspiration, and the criteria for success (2).

And this sense of psychological failure fosters distaste in the administrator. If he "plays the system" in order to "beat it," he succeeds as an administrator but fails as a human being. He feels guilty if he refuses to obey but he damns himself if he does obey. Organizational members find confronting this difficulty or failing to go along with this "game" very stressful and emotional, even though, in terms of the adequate use of all available

information, such open behavior would be unmistakably "rational" (2).

A third result of the maximum display and availability of information (such as newsprint summaries of group discussions and decisions and the meeting in the round of the Administrative Council) is the increased emphasis on what and how things are done rather than on who did it. Such a problem-solving stance forces leadership to be based more on competence than on organizational power or position. This makes it more difficult for any one person to control members' responses in order to guarantee that his decisions become the group's decisions. As others are encouraged to offer valid and complete information about an extensive organizational problem, the previously short, sweet, and efficient solution to the problem becomes one that is carefully examined, widely shared, and agonizingly revised on the tenuous and ambiguous way to a creative solution.

As information is allowed to become more widely available and as all administrative personnel become involved in defining and solving problems, increasing feelings of essentiality will result, as they did in the OIM. People who are encouraged and given the opportunity to think, will. But as they do think, it is less likely that they will blindly support the self-fulfilling revelries of other persons or groups who have already devised the solution, who have to date had the wit and ability to persuade others to implement their solution, and who consequently believe that they are capable and efficient leaders of men. Such a feeling of essentiality--or personal involvement and commitment to an open, problem-solving orientation--flies in the face of sophisticated management and planning systems, particularly those designed by someone else (2). Hence the dilemma. An efficient system of administration

in a large school district must rely on valid information about largely unprogrammable problems which demand mutually creative and innovative solutions. The degree of availability of this information depends to a great extent on the level of feelings of essentiality by the administrative personnel who possess that information. And yet these very feelings of essentiality encourage resistance to or strong confrontation of solutions which are presented with little consultation or involvement. Such a dynamic emerged during the OIM and the following meetings.

The dependency upon valid information from all sectors of administration necessitates the reduction of intra- and inter- group competition. In educational organizations it is quite common for certain administrative units, such as individual schools and administrative offices, to take on types of "corporate character." One school comes to be labeled a "free school," another a "straight school," and yet another a "loving school," and soon this development of identities and status systems within administrative units increases the likelihood that each unit will develop strong working loyalties and commitments to the aims and mission of that particular unit. And yet the organizational facts of life are such that units must compete with other units for a share of increasingly scarce resources in order to perform their educational tasks. If such competition is valued by the organization because it produces more commitment and apparently better results, this competition between groups will likely produce stronger identities and status systems, a "sticking together," and a consequent sharing of only the "right" information in order to obtain a particular goal of that organizational unit. The result may be a cutting back of resources requested

and required by other units. Thus, what one unit gains the others lose.

Where attempts to achieve collaboration between units have succeeded, a goal has been set which has a great appeal to all units and no particular unit can achieve that goal without the help and resources of the other units. While efforts to reduce competition and enhance cooperation are scarce (2), it is important to note that when such collaboration is achieved, it stems from the setting of a "superordinate goal" of the practical, survival, "bread-and-butter" type which is clearly understood and open to very little, if any, interpretation (10). This type of goal is somewhat different from such typical goals--or cliches--of educational organizations as "what's good for the child," or "the worth of the individual." While such goals are eminently worthwhile, they do leave a lot open to interpretation and to differing behavioral definitions. The type of achievement then which is most useful to a particular unit in competition with others for limited resources is likely to be the loudest bandwagon for the most current slogan which will lead to the most favorable interpretation of what is happening within that unit. Such a "rabble hypothesis" can have dysfunctional effects upon organization-wide cooperation (2). In educational organizations there is a long history of such independent survival through such combat with the result that units and their administrators are understandably skeptical and cautious about sharing information relevant to unprogrammable, creative, innovative decisions that demand cooperation. This dynamic too was experienced in the OIM.

CONCLUSION

In retrospect, some effects of constricted or limited information systems upon relevant administrative personnel have been noted. The OIM can be viewed as an attempt to overcome these effects and to begin efforts to more adequately involve others in problem-solving and in more jointly managing the change which is inevitable within the organization. The general objective of the OIM was to obtain relevant information about goals for the organization and about difficulties in and strategies for achieving these goals. This meant building interpersonal-competence norms of openness about organizational issues and removing barriers to communication. The very fact that information relevant to the adequate administration of a large school district is complex, has high social responsibility as well as interpersonal value, and is usually distributed unequally among administrative personnel highlights the importance of creative and thorough attempts to design methods (including workshops and meetings) to overcome some of these practices constricting information sharing. Whether the information is precise or vague, makes little difference in the rational and emotional effects upon those who receive, hold on to, and must use it.

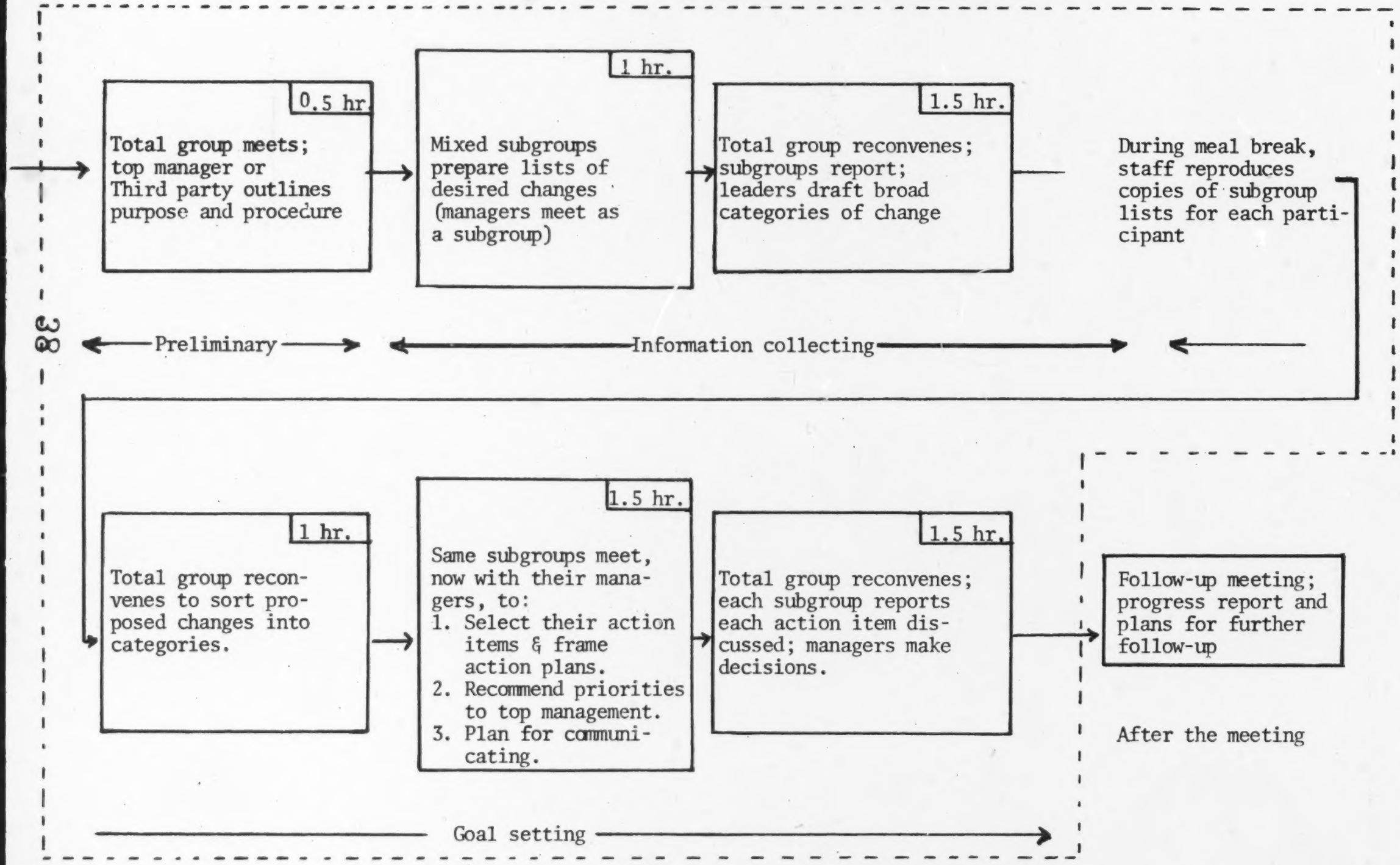
Testimony from many administrative personnel in the school district indicates that this meeting, which was the first such OD intervention with the entire administrative team of the organization, was a turning-point in the OD Unit's first year of existence. A shift resulted

towards more open sharing of relevant information, greater involvement of administrative personnel in decision-making, increased commitment of those personnel towards developing and achieving organizational goals, and greater collaboration and less competition within the organization.

APPENDIX A

Figure 1

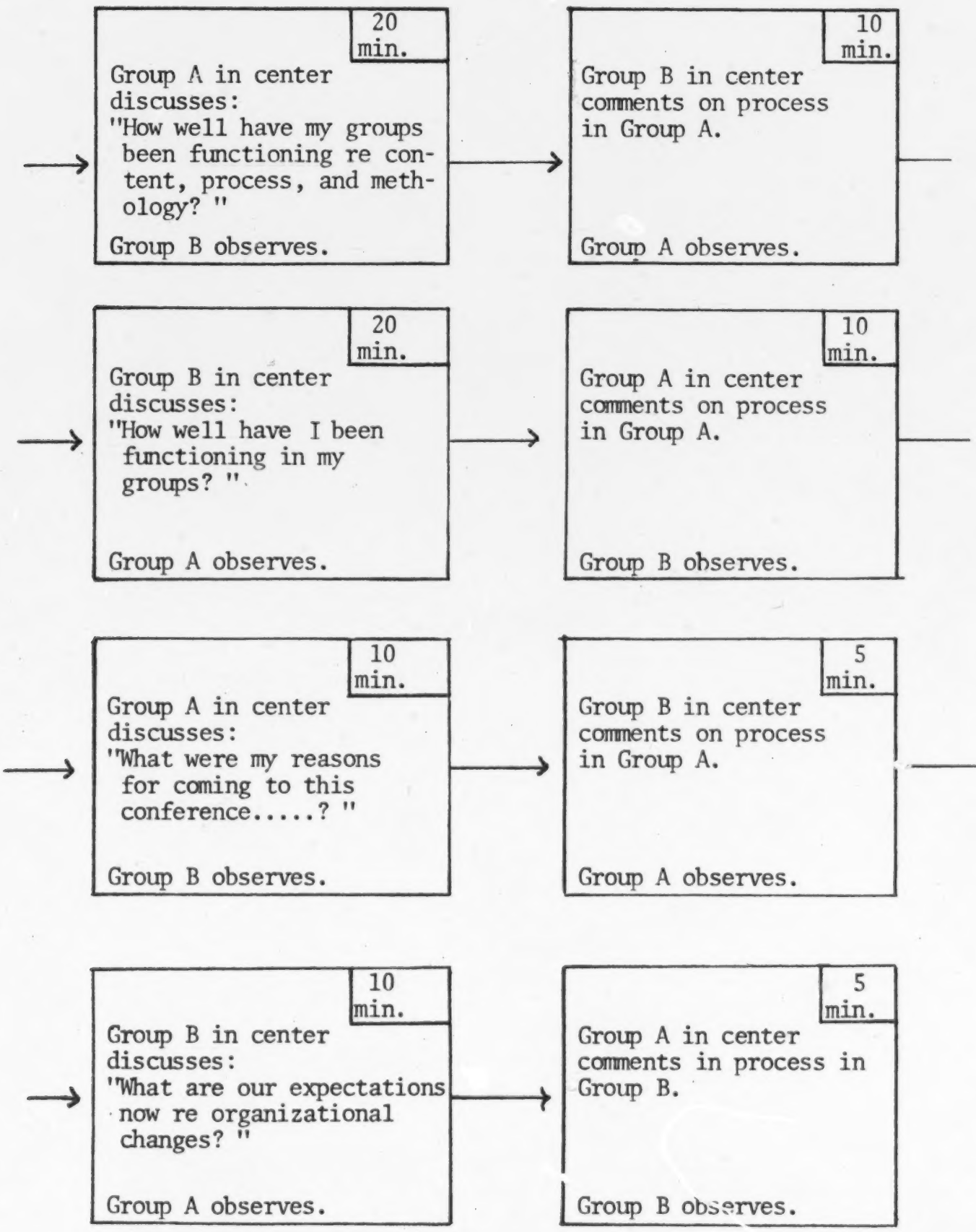
Procedure for Confrontation Goal-Setting Meeting (6)


0.5 hr.
Total group meets; top manager or Third party outlines purpose and procedure
1 hr.
Mixed subgroups prepare lists of desired changes (managers meet as a subgroup)
1.5 hr.
Total group reconvenes; subgroups report; leaders draft broad categories of change
During meal break, staff reproduces copies of subgroup lists for each participant
Preliminary
Information collecting
1 hr.
Total group reconvenes to sort proposed changes into categories.
1.5 hr.
Same subgroups meet, now with their managers, to:
1. Select their action items & frame action plans.
2. Recommend priorities to top management.
3. Plan for communicating.
1.5 hr.
Total group reconvenes; each subgroup reports each action item discussed; managers make decisions.
Follow-up meeting; progress report and plans for further follow-up
After the meeting
Goal setting
The meeting

APPENDIX A

Figure 2

Procedure for Cluster Discussion and Observation


20 min.
Group A in center discusses: "How well have my groups been functioning re content, process, and methology? "
Group B observes.
10 min.
Group B in center comments on process in Group A.
Group A observes.
20 min.
Group B in center discusses: "How well have I been functioning in my groups? "
Group A observes.
10 min.
Group A in center comments on process in Group A.
Group B observes.
10 min.
Group A in center discusses: "What were my reasons for coming to this conference.....? "
Group B observes.
5 min.
Group B in center comments on process in Group A.
Group A observes.
10 min.
Group B in center discusses: "What are our expectations now re organizational changes? "
Group A observes.
5 min.
Group A in center comments in process in Group B.
Group B observes.

APPENDIX B

Organizational Inventory Meeting Evaluation:

Questionnaire Items

and

Raw Scores and Percentages

N=93

Looking back over the conference, evaluate the following events by circling the appropriate phrase.

1. Confrontation Meeting (Sunday and Monday evening)

valuable	some value	no value	detrimental	no response
23 (25%)	55 (59%)	7 (8%)	3 (3%)	5 (5%)

2. New Groups Clustering in Circles (Monday afternoon)

valuable	some value	no value	detrimental	no response
44 (47%)	38 (41%)	5 (5%)	1 (1%)	5 (5%)

3. Planning for Living (Monday night)

valuable	some value	no value	detrimental	no response
44 (47%)	32 (34%)	12 (13%)	2 (2%)	3 (3%)

4. Frank Jasinski's Presentation (Tuesday morning)

valuable	some value	no value	detrimental	no response
47*(52%)	39 (42%)	3 (3%)	1 (1%)	3 (3%)

5. Bug list exercise (Tuesday afternoon)

valuable	some value	no value	detrimental	no response
42 (45%)	42 (45%)	4 (4%)	1 (1%)	4 (4%)

6. Administrative Council Meeting in the round (Wednesday morning)

valuable	some value	no value	detrimental	no response
48*(52%)	31 (33%)	12 (13%)	1 (1%)	1 (1%)

7. Director and OD Team in the Round (Wednesday afternoon)

valuable	some value	no value	detrimental	no response
17 (18%)	30 (32%)	29 (31%)	16 (17%)	1 (1%)

8. Director and Administrative Council Fielding Questions (Wednesday afternoon)

valuable	some value	no value	detrimental	no response
42*(45%)	47 (51%)	2 (2%)	1 (1%)	1 (1%)

9. Interest Groups (Wednesday night)

valuable	some value	no value	detrimental	no response
41*(44%)	40 (43%)	10 (11%)	0-	2 (2%)

Suggestion

10. Holding a Quarterly Meeting

valuable	some value	no value	detrimental	no response
50*(54%)	36 (39%)	4 (4%)	1 (1%)	2 (2%)

* = 1 superlative

Note: a) A "no response" was generally reported to be the result of absenteeism.

b) Where a double response was given (e.g., "a little value" written in rather than "some" or "no value" circled or "some value" circled by marked "2nd half"), then the higher of the two ratings was used.

APPENDIX C

Group Rating Scales (12)

NAME:_____ GROUP:_____

After each meeting fill in the box with the number on the scale which most accurately expresses your own individual observations and feelings about your group experience for that particular session.

A. GROUP EFFECTIVENESS: In terms of active contribution of ideas and utilization of our resources to reach our goal, I feel my group is the:

most effective possible 9 8 7 6 5 4 3 2 1 least effective possible group.

Meeting #	1	2	3	4	5	6	7	8	9	10
My rating:										

B. GROUP'S GOALS: My group's goals were:

clear, explicit agreed upon 9 8 7 6 5 4 3 2 1 completely unclear, filled with assumptions

Meeting #	1	2	3	4	5	6	7	8	9	10
My rating:										

C. HERE & NOW--THERE & THEN: The things we talked about were:

completely here & now 9 8 7 6 5 4 3 2 1 competely there & then

Meeting #	1	2	3	4	5	6	7	8	9	10
My rating:										

D. LEVELING: In contributing significant ideas or feelings in the group I was:

completely free & open 9 8 7 6 5 4 3 2 1 completely closed & hidden

Leveling (cont.)

Meeting #	1	2	3	4	5	6	7	8	9	10
My ranking:										

E. MY EFFECTIVENESS: In helping the group I was:

completely effective 9 8 7 6 5 4 3 2 1 completely ineffective

Meeting #	1	2	3	4	5	6	7	8	9	10
My ranking:										

F. MY EXPECTATIONS: My expectations have been:

completely satisfied 9 8 7 6 5 4 3 2 1 completely frustrated

Meeting #	1	2	3	4	5	6	7	8	9	10
My ranking:										

G. RECEPTION OF MY CONTRIBUTION: In working to obtain understanding among the members of the group, my views were:

completely discussed, examined & considered 9 8 7 6 5 4 3 2 1 completely disregarded or rejected

Meeting #	1	2	3	4	5	6	7	8	9	10
My ranking:										

H. CONTENT, PROCESS, METHODOLOGY: For each session distribute 100% among these three categories in a way which will indicate the amount of time which was spent on each:

Meeting #	1	2	3	4	5	6	7	8	9	10
Content:										
Process:										
Methodology:										

I. ATMOSPHERE OF SESSION: For each session check the words which describe your group's operation:

Meeting#	1	2	3	4	5	6	7	8	9	10
10 Productive										
9 Rewarding										
8 Opinionated										
7 Ineffective										
6 Competitive										
5 Evasive										
4 Work										
3 Fight										
2 Flight										
1 Tense										

J. TASK SKILLS: Check the things you personally were doing;

Meeting #	1	2	3	4	5	6	7	8	9	10
10 Finding common goal										
9 Confronting issues										
8 Data seeking										
7 Identifying alternatives										
6 Linking conflicting issues										
5 Evaluating										
4 Dominating										
3 Reality testing										
2 Keeping group on goals										
1 Initiating										

K. MAINTENANCE SKILLS: Check the things you personally were doing:

Meeting #	1	2	3	4	5	6	7	8	9	10
10 Gate keeping										
9 Giving support										
8 Process analysing										
7 Listening										
6 Providing Information										
5 Clarifying										
4 Following										
3 Providing method										
2 Blocking										
1 Risking constructively										

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